

243 soils of the oak forest) prevail, and where the low rainfall is inimical to maize cultivation. Wheat is an important crop also on the well-drained soils of the Tertiary loess-covered plateau, on which chernoziom also develops, between the Prut and Siret. Here, below 1,000 feet, wheat is extensively grown, for here again the climate approximates to the steppe type. Grain began to be exported from the Danube plain depression in appreciable quantities only in 1833, the year of the great Russian famine, but in thirty years it had taken the place of grazing land and meadow over all the Black Earth region. The breaking up of the large estates, however, and the unsettled conditions during and since the War have checked the development of large-scale wheat production for export. After the War, the production of grain of all sorts fell off heavily as a result partly of a heavy tax imposed on grain export, partly of uneconomic farming due to the subdivision of estates, partly of the Government's taking over the marketing of wheat and rye and fixing prices for those commodities—a policy which discouraged production of these crops by the peasants, who concentrated on the production of maize, with barley and oats for home consumption in the wetter highlands. In any case, the yield of wheat in regions of steppe climate varies enormously from year to year with the winter and spring precipitation, and even during the period of normal progress in the decade preceding the War the export varied between nearly 2 million tons and less than 200,000. In spite of the rich soils, the yield per acre is small judged by western European standards.

BARLEY does very well as a peasant fodder crop in the dry south-east of the Old Kingdom, and is a crop of some importance in Transylvania (1½ to 2 million hectares). In Moldavia and Oltenia under moister conditions, the high starch content makes it useful for brewing, and it is grown mainly on the larger estates.

● 248 HEMP AND FLAX are grown, the latter decreasingly, by the peasants for use in domestic textile industry. Imported cotton yarn has largely taken the place of linen.

245 As regards the vine—the best grapes for wine are produced in small holdings in the hill country of Transylvania (chiefly produced by the Saxon communities), Wallachia and

- 132 being common at this height (440 metres and upwards). July and August are the hottest months.

THE MEAN annual rainfall for Curtea de Argeş (taken over a period of nine years) is 672 mm. Precipitation occurs all the year round, but the rainiest months are May and June.

- 243 THE PRINCIPAL crop is maize, from which not only is the staple food "mamaliga" made, but the stems and leaves are used for animal fodder and bedding. Oats and rye are grown for fodder on the larger farms only. Wheat is not grown in the region. Soil and climate are suitable, but at present the peasant possesses very little machinery; harvesting would have to be done with a sickle or scythe and threshing with a flail. It is easier to buy such wheat as is required from the Wallachian Plain.

- 244 IN ADDITION to the above, every farm, however small, grows various vegetable crops: pumpkins for fodder, tomatoes, paprika, potatoes, onions, runner beans, cabbages, aubergines, often amongst the maize, sometimes as ground crops in the orchards.

- 246 CULTIVATED FODDER crops are grown only on the larger farms, and consist of clover, lucerne and sometimes a mixture of vetch and oats, and very occasionally turnips.

THE LOWER slopes of the hills form the natural hay meadows of the commune, but occasionally the grass of the orchard is used as rough pasture.

- 248 HEMP is grown on the low-lying farms, usually as a boundary crop for the maize. Flax is also grown, but very few sunflowers.

- 245 AN IMPORTANT aspect of agriculture around Curtea de Argeş is fruit cultivation. Apples, pears and plums are the main crops, with occasional cherries. Every farm, however small, has some fruit trees, sometimes scattered over the whole holding, but more usually in a small orchard. Sufficient apples are grown to allow a considerable export trade to Bucharest. Plums are used for the manufacture of the alcoholic drink *tuica* in Curtea de Argeş. Recently plum-drying has been tried, and is already being taken up successfully by the more enterprising peasants. Walnuts also are gathered and sold.

241 The basis of Rumanian economy is agriculture, in that some 50 per cent. of the population derive their livelihood from the land and agriculture provides a high proportion of the national income. During recent years, however, the expansion of the oil industry has meant that agricultural produce has played a decreasing part in the country's exports, having been superseded by oil, exports of which amounted to 43 per cent. of the total export trade in 1938, compared with 19 per cent. in 1927; while grain exports in 1938 represented 23 per cent. compared with 46 per cent. in 1927.

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[439] In spite of the importance of agriculture to national prosperity farming methods are backward and per acre crop yields are among the lowest in Europe. Attention is particularly given to growing cereals, and of these maize is the chief, providing a large surplus for export (apart from the war years). Livestock density is low, which is one of the weaknesses of Rumanian agriculture, the Banat being the only district in which numbers are fairly high, and farming approaches the intensive system. It must be stressed that the relatively large export surplus, which consists of wheat, maize, barley, oilseeds and pulses, livestock, oilseeds, etc., is only made possible by the very low notional level which prevails, and that if this were raised to anything like western European standards exports would be commensurately reduced.

● 248
249 Since the war more attention has been paid to the growth of industrial crops such as sunflower, soya, cotton, hemp and flax, and the cultivation of rubber-bearing plants has been started following the finding of the Kol Saghye plant left by the Russians in Bessarabia. Though some success has been achieved in increasing the areas under textile fibres, and yields have been slightly higher, the hoped for increases in soya and sunflower cultivation have not been achieved due to unfavourable weather conditions and to general wartime dislocation.

313 Rumania's forest resources, though extensive, have suffered severely from a consistent policy of over-exploitation, and, while providing the basis of a fairly important industry during the period between the two wars, have been so depleted that cutting will have to be very restricted for a number of years if they are to be allowed to recover. The loss of Northern Transylvania has affected the timber industry in particular, as a high proportion of the forest resources were located there, and in that district this industry was better developed than elsewhere in the country.

IMPORTANCE OF OIL

315 Oil plays a major part, not only in Rumania's foreign trade, but also in covering her domestic fuel requirements, to a large extent replacing coal, reserves of which are small and of low quality. Since the war and the resulting pressure which Germany has exerted to obtain increased quantities of oil for her armies, (combined with the consistent drop in the rate of production between 1936 and 1941), serious attempts have been made to find alternative sources of fuel. The enormous reserves of natural gas existing in Transylvania, which were exploited only very slightly before the war, are being used increasingly as a source of fuel to supply local industries, and a

A. TEXTILES AND TEXTILE FIBRES

248 In the years preceding the war, Rumania had been making efforts, with some success, to reduce the degree of her previous dependence on imports of textile fibres. The cotton crop of fair average quality, though still far short of the expanded mill capacity, was gradually increasing, while indigenous wool supplies—though chiefly of coarse quality—were in the main enough for peasant clothing. Home-grown crops of hemp and flax were sufficient for internal needs, while jute, coir and hard hemp were imported to complete the requirements of industrial fibres.

[236] 248 The cessation of imports and loss of territory to her neighbours have entirely changed the supply picture, and combined with demands by Germany for imports have greatly reduced the textile "standard of living."

1. Cotton

439 With the development of her processing industry, Rumania had increased raw cotton imports and was successfully encouraging domestic cotton production. By 1938, imports at some 21,000 tons were about five times larger than those of 1932, and the domestic crop yield, less than 20 tons in 1932, had risen to about 600 tons. The principal sources of raw cotton were Egypt, the U.S.A., and Great Britain.

With the outbreak of war, Rumanian imports generally were curtailed, the combined total of raw cotton and cotton materials being 24,700 tons in 1940, and 13,800 tons in 1941. Thereafter, Rumania was dependent on such supplies as she could obtain by barter, lower grade cotton from Turkey and Italy and cotton and staple fibre union cloth from Italy.

248 Since 1938 the Rumanian cotton crop has continued to increase, though it is still very short of normal requirements, while the cession of some 8,000 ha. (20,000 acres) of cotton land to Bulgaria in 1940, and unfavourable weather conditions, tended to restrict the cotton-growing programme.

Prior to the territorial changes of 1940, cotton was grown close to the Danube at Craiova, and especially in the Southern Dobruja. With the cession of most of this land to Bulgaria, cotton is now mostly grown on the north bank of the Danube, at Banloc near Timisoara in the Banat and in the districts of Teleorman, Vlasca and Ialomita. The crop in 1939 was 2,200 tons from less than 10,000 ha. (24,000 acres) and in 1942 was estimated at 5,000 tons from about 20,000 ha. (50,000 acres). A further increase in area has been planned, but the harvest, particularly in the north, is largely dependent upon climatic conditions. The type of cotton now produced is considered superior to Indian, and similar in quality to American.

288 The chief mill centres are at Arad, Bucarest, Cluj, Iasi, Lugoj and Timisoara; of these, Cluj is the only one to have been affected by the transfer of territory. Cotton supplies are distributed under the direction of the Department of Industry and Trade by "Romacotin," which also has a monopoly of purchase from producers at prices fixed by the General Price Commissariat. Cotton may be sold only to those Government agencies to whom it has to be delivered by

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288 31st December. There appears to be a good deal of passive resistance and hoarding.

Cotton spindles had increased from 35,000 in 1927 to 250,000 in 1938, and altogether there were 26 mills of some importance. Power looms in 1938 are believed to have amounted to about 26,000. The apparent disproportion of spindle compared with loom capacity was due to Rumania being a fairly important buyer of foreign yarns, imports being 23,000 tons in 1936, 27,000 in 1937, 24,000 in 1938 and 25,000 in 1939. About 70 per cent. of these yarns were of coarse cotton, called "peasants' yarn," for use in the handicraft industry only, and imported mainly from Czechoslovakia, Germany, Italy and Great Britain.

2. Wool

236 Rumania, which had the largest wool-growing industry in S.E. Europe, was also the most important consumer. Production of raw wool in 1938 was about 20,000 tons (greasy) and imports were about 1,000 tons, and of wool yarn about 2,500 tons. On account of its coarse quality, not much more than one-third of the domestic wool clip is ordinarily used in the mechanised industry, the bulk being consumed in village handicraft. Since the war and subsequent loss of territory, [233] the sheep population of Rumania is believed to have declined by some 25 to 30 per cent., and all imports have ceased, so that the industry is now entirely dependent upon the reduced domestic clip.

288 Rumania was never a large importer of woollen cloth, and the weaving industry was always more highly developed than the spinning. The output of cloth in 1936 and 1937 being 6,000 tons and 6,600 tons respectively. In 1938, there were 127,000 mechanised spindles and 4,300 looms; the chief mill centres, in order of importance, being at Buhusi (district of Neamt), Braso, Timisoara, Bacau, Bucarest and Sibiu.

655 Both the raw material and the woollen-textile industry are nominally under strict Government control, as by a decree in April 1942, the numbers of sheep and lambs and the quantity of shorn wool must be declared each year, and the wool itself must be surrendered to collecting centres at specified dates. As the due date for the 1942 collection had to be extended month by month up till January 10th, 1943, and all penalties abrogated, the success of the scheme appears to have been doubtful. No wool can be bought or sold except by permit of the Ministry of National Economy, and distribution to the mills is entrusted to an organisation known as "OFIL" (Official Lăner), a company with a capital of 10 million lei, and including all firms concerned in the preparation of wool.

3. Hemp

248 In 1937 the area under hemp, which is grown chiefly in the Banat, was 50,000 ha. (123,000 acres) and the outturn 27,000 tons, most of which was consumed internally. Exact details of war-time plantings are not known, but are reported as 45,000 ha. (112,000 acres) and 32,500 ha. (80,300 acres) in 1941 and 1942, and the yield at about 21,000 and 20,000 tons respectively. For 1943, farmers have been urged to plant more hemp—the "national textile"—in order to cover clothing.

CHAPTER VI

248 seed and rope requirements; and a hemp and flax office has been established with a capital of 20 million lei and a credit of 500 million to distribute seed and manure, and to rent and finance retting and scutching plants. This office, which is the only purchaser of these fibres, is to make no profits, and profits are to be fixed. Fifteen up-to-date plants are to be erected in 1943 in the hemp-growing areas.

1439 Although Romania normally had little or no export balance, Germany in 1941 demanded 15,000 tons of the 20,000 tons available. How much of this was actually delivered is not known, but the shortage of hemp and other fibres has led to amazing competition between the various industries for the remaining supplies, and a hemp rope and sack factory is to be built at Chisinau in Bessarabia, where the shortage of these goods is particularly acute.

4. Flax

Flax appears to be the only crop grown on a smaller area in 1943 than in 1941 and 1942, when 20,000 ha. (49,400 acres) were planted, as compared with 15,000 ha. (37,000 acres) in 1940 and 12,000 ha. (29,600 acres) in 1939. Preference, apparently, is to be given to hemp. The pre-war output was about 10,000 tons, but no reliable figures are available since 1939. Normally, there was no appreciable export of flax, but as with other fibres, the Germans appear to have been persistent in their demands. The Romanian company, *Fabrilul Cotonosa*, in which German capital participates, is to build flax-retting tanks at Ceretari (in the district of Doff) and Zimnoven (in the district of Tulcea).

5. Rayon and Staple Fibre

218 There were two plants erected before the war: the "Apertura" at Popesti-Leordeni and the *Viacosa Rominca* at Lupeni, the combined daily capacity of which was 12 tons of rayon and 6 tons of staple fibre. (Approximately 4,200 tons rayon and 2,100 tons of staple fibre annually.) There has been but little expansion since, and the present annual production is estimated at 4,400 tons rayon and 2,600 tons staple fibre. Imports from Italy have been 450 tons in 1940, and 2,500 in 1941. Germany promised substantial quantities, but it is doubtful whether they fully materialised. Applications for permission to erect a new pulp mill have been made by both German and Italian interests, but it seems that the Germans objected to *Smia Viacosa*'s being granted a concession and obtained it themselves later.

6. Silk

231 Although Romania is within the orbit of the silk belt, output is small, reaching a maximum of 20 tons of cocoons in pre-war years, and 35 tons of reeled silk were imported, principally from Italy. Silkworm breeding is located in the Banat, and in common with the drive for increased silk production in German Europe, Romania has made efforts to increase silkworm breeding.

217 In 1937 about 5,000 workers were engaged on silk weaving (probably including artificial silk); this number was increased to 7,330 in 1941. It is reported that the cocoon crop is now delivered to the Air and Marine Ministries, presumably for making cartridge bags, etc.

7. Other Fibres

248 439 Raw jute imports averaged about 5,500 tons annually before the war, and in addition there were smaller imports of jute cloth and bags.

248 Paper, and paper mixed with hemp, are now used
439 to substitute jute.

Although a comparatively large producer of soft hemp, Romania normally needed to import about 2,500 tons of other hemp for special purposes, and the source of these imports have been severed since her entry into the war.

Comparatively negligible amounts of oak were also imported in peacetime.

288 B. Clothing Rationing

291 Unlike almost all other Enemy and Occupied
434 countries, Romania possesses no official rationing card, although purchases are restricted to a specific number of garments per year. Since 1929 the Government, anxious to avoid the necessity for a card rationing system, has adopted various means in an endeavour to overcome the shortage of textiles, particularly of cotton and wool.

Standardization of fabric and fixed prices were introduced in 1930, but clothing of standardized material was frequently unobtainable since the price did not leave the retailer a profit.

Army demands soon called for a great increase in clothing production, thereby reducing the stocks and greatly raising prices of civilian clothing—these for overcoats rose by 500 per cent, and for knitted goods by 200 per cent—and the difficulty of importing raw materials soon reacted on the industry, so that by 1941 the textile shortage, particularly of bad linen, had become serious. Later in the same year, the Ministry of Supply blocked the sale of all semi-manufactured or manufactured blankets.

Early in 1942 the Government requested the public to purchase only necessities, ordering the industry at the same time to use cotton allocations for the manufacture of standardized bad linen and clothing only. Later in 1942 it was decreed that the annual allotment of garments per head of the population was two suits, i. e. frocks, one overcoat, three shirts, 20 handkerchiefs, three pairs of socks or stockings, one sheet, three towels. The sale of standard cloth was restricted to three metres per person per annum. For this arrangement, however, clothing coupons were not issued and purchasers were requested to produce their identity cards and a signed certificate of need if the purchase exceeded 500 lei.

291 Non-standard articles are still obtainable, but
435 their exorbitant prices make them accessible to a limited section of the public only. Retailers are known to have refused the sale of standard cloth even when displayed, in order to secure, if possible, the higher profit margin for non-standard goods.

[565] The members of the public most severely affected by clothing shortage and high prices are industrial workers and the poorer urban population. Though the large firms are supposed by law to supply their employees with clothing (as well as food) at cheap prices, it is thought that this is not being widely practiced.

Prices of all materials for men's garments have risen to such an extent that people cannot afford to buy even such goods as are available in the shops.

248 To counteract shortage of clothing fibres,
656 peasants are being encouraged by the Government to increase cultivation of flax and hemp for production of the rough cloth suitable for peasant clothing.

[30b]